TECHNICAL PLANNING AND STRATEGY

HURON

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INTRODUCTIONS

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Huron

Technical Solutions Director for Higher Education Oracle Cloud ERP and HCM Implementations

+ Development Strategy

+ Technical Project Management

+ Integration Strategy

+ Client Success

+ Product and Subject Matter Expertise

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Agenda

1. Introductions
2. Instance Management key to Conversions
3. Conversion Considerations
4. Conversion Planning
5. Lessons Learned

Huron's Oracle Cloud Experience

Huron has performed more successful Oracle Cloud Assessment, Planning, Implementation, and Optimization projects in Higher Education than any other firm, including the following institutions:
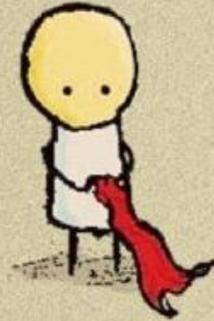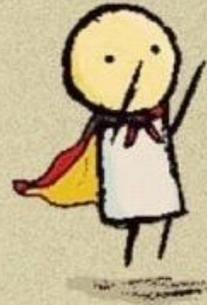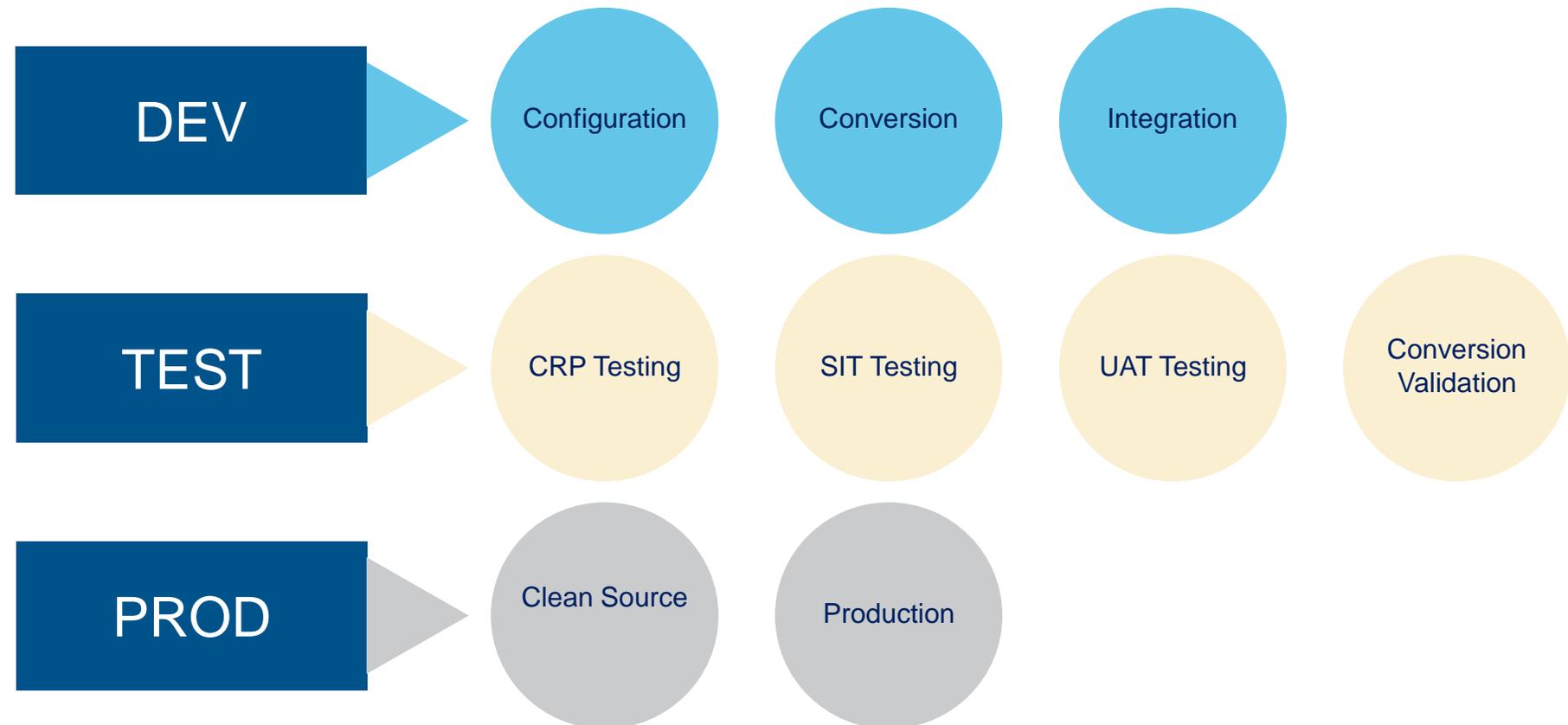
get cape.   wear cape.   fly.
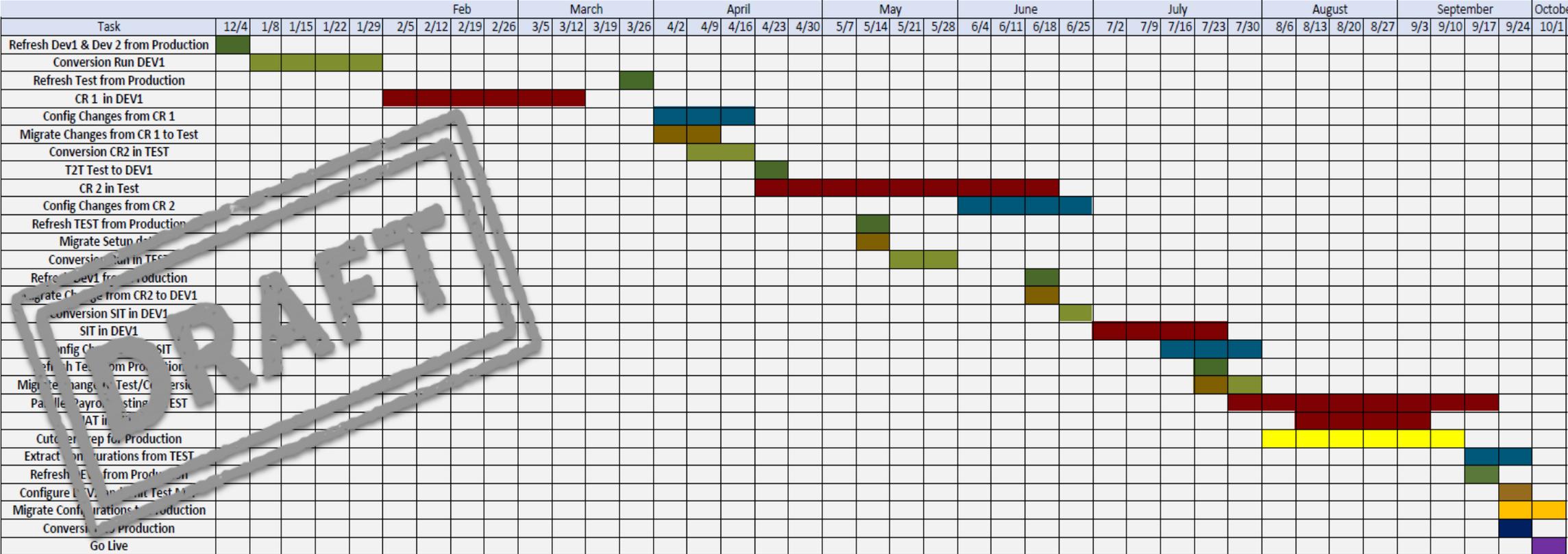
Instance Management

- Instances, licenses, rounds of conversions
- Managing Integrations

DEV	Configuration	Conversion	Integration	
TEST	CRP Testing	SIT Testing	UAT Testing	Conversion Validation
PROD	Clean Source	Production		

Instance Management

Using Project Plan Map out the Instance Usage

Task	12/4	1/8	1/15	1/22	1/29	2/5	2/12	2/19	2/26	3/5	3/12	3/19	3/26	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/18	6/25	7/2	7/9	7/16	7/23	7/30	8/6	8/13	8/20	8/27	9/3	9/10	9/17	9/24	10/1
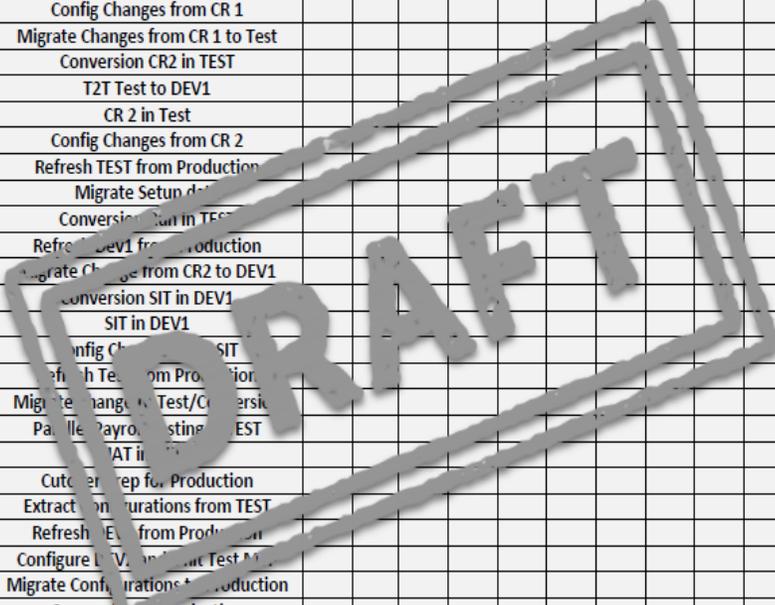
Instance Management

Using project plan create a refresh scheduling calendar

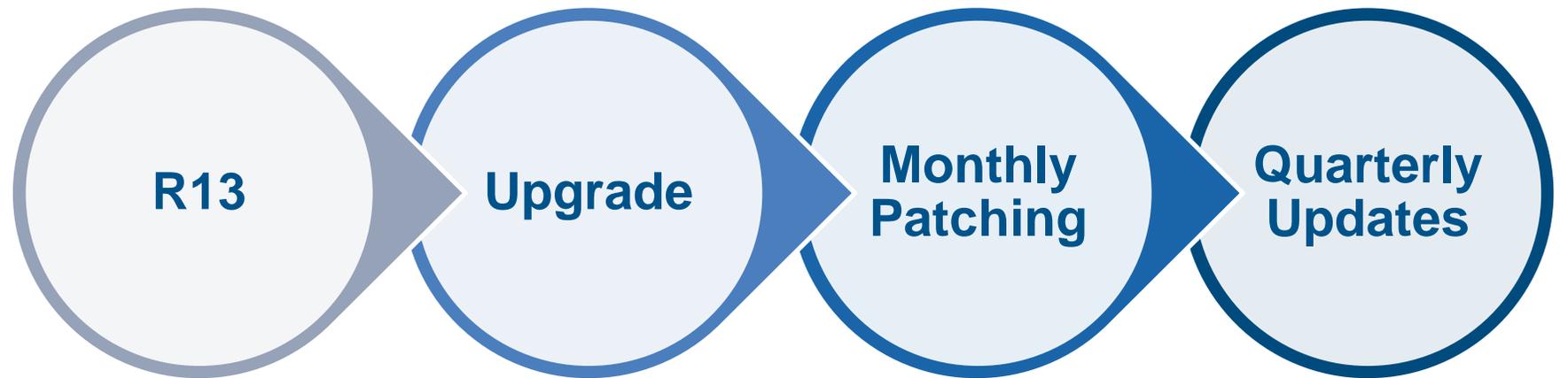| Refresh Schedule		Start	End									
Blackout period, monthly patching refresh request not allowed	Concurrent Patching:	1-Nov-16	30-Jun-17									
Contingency refreshes												
Refresh in Progress												
Completed												

Robert Stojkovic:
Robert Stojkovic:
4 to 6 weeks before refresh needed

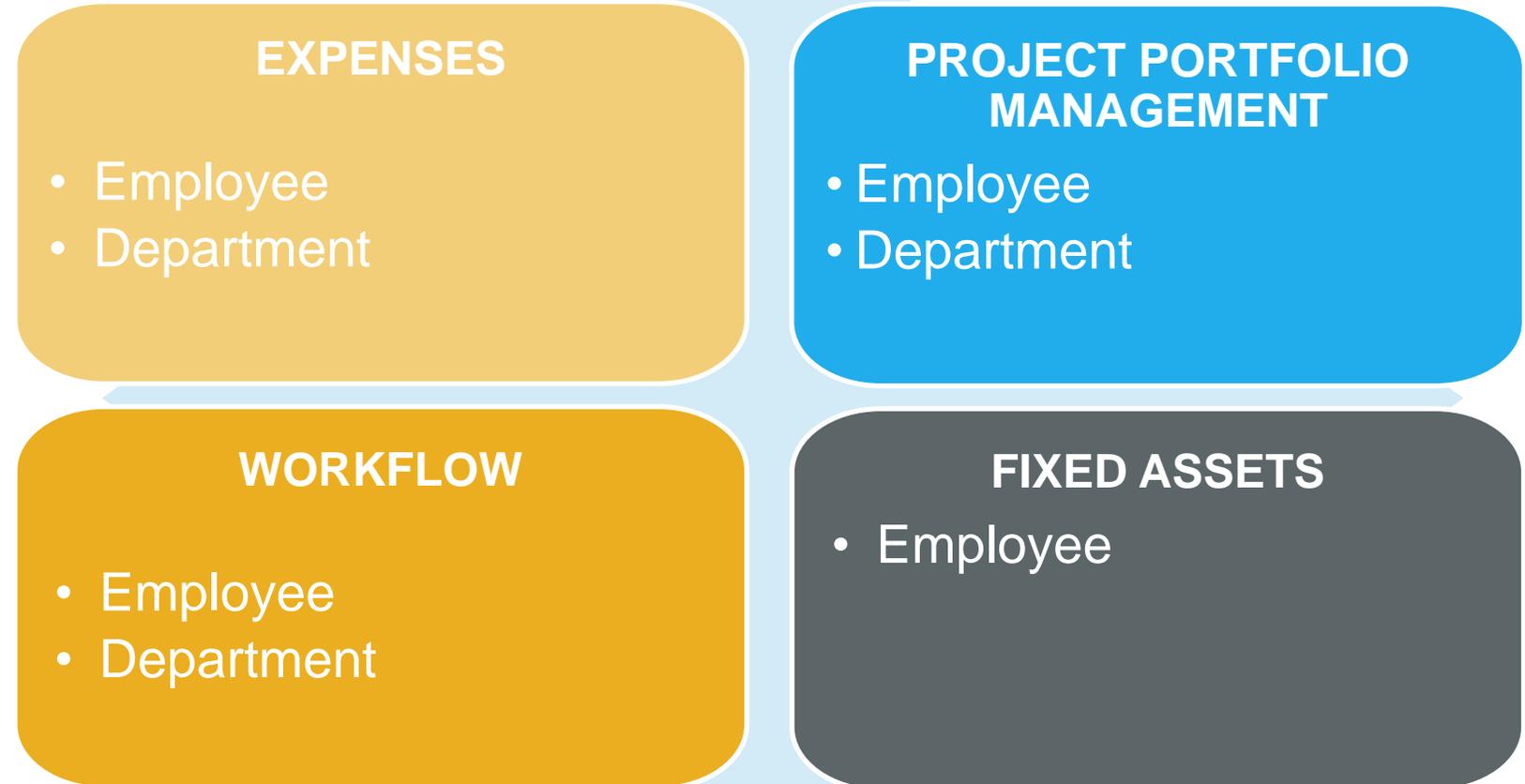**Robert Stojkovic:**
1 week before refresh is to take place

Instance To Be Refreshed (Target)	Source	Refresh Type	Need By Date	Refresh Start Date	Refresh Completion Date	Refresh Request Date	Actual Request Date	Drop Dead Refresh Request Date	Drop Dead Refresh Cancellation Date	Refresh Requested	Cancel Refresh Requested	Oracle SR
Cloud Env:Dev (cloud-dev1)	Cloud Env:Test (cloud-test)	T2T	10/17/2016	10/13/2016	10/16/2016	9/22/2016	9/22/2016	9/5/2016	10/4/2016	Y		3-13373040381
Cloud Env:Dev (cloud-dev1)	Cloud Env: PROD (cloud)	P2T	11/27/2016	11/23/2016	11/26/2016	10/16/2016	10/6/2016	11/2/2016	11/14/2016	Y		3-13446250831
Cloud Env:Dev (cloud-dev1)	Cloud Env: PROD (cloud)	P2T	12/4/2016	12/1/2016	12/4/2016	10/20/2016		11/10/2016	11/22/2016			
Cloud Env:Dev (cloud-dev1)	Cloud Env: PROD (cloud)	P2T	12/11/2016	12/8/2016	12/11/2016	10/27/2016	10/21/2016	11/17/2016	11/29/2016			3-13519144151
Cloud Env:Dev (cloud-dev1)	Cloud Env: PROD (cloud)	P2T	12/18/2016	12/15/2016	12/18/2016	11/3/2016		11/24/2016	12/6/2016			
Cloud Env:Test (cloud-test)	Cloud Env:Dev (cloud-dev1)	T2T	1/15/2017	1/12/2017	1/15/2017	12/1/2016		12/22/2016	1/3/2017			
Cloud Env:Test (cloud-test)	Cloud Env: PROD (cloud)	P2T	3/8/2017	3/8/2017	3/11/2017	1/25/2017		2/15/2017	2/27/2017			
Cloud Env:Dev (cloud-dev1)	Cloud Env:Test (cloud-test)	T2T	3/8/2017	3/8/2017	3/11/2017	1/25/2017		2/15/2017	2/27/2017			

Instance Management Refresh Considerations

Blackout During Upgrade (Patching) Weekend

Production and Development Must Be On Same Patch Level

Snapshot is taken with first 30 minutes

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Instance Management

R13 → Upgrade → Monthly Patching → Quarterly Updates

Modular Configuration

EXPENSES

- Employee
- Department

PROJECT PORTFOLIO MANAGEMENT

- Employee
- Department

WORKFLOW

- Employee
- Department

FIXED ASSETS

- Employee

Configuration vs. Customization

Configuration
- NO changes to the source code
- Delivered Functionality

Customization
- Create functionality that is not available through configuration

Configuration

Oracle SaaS

- Flex Fields

- Fast Formulas

- User Defined Tables

- User Preferences

Configuration vs. Customization
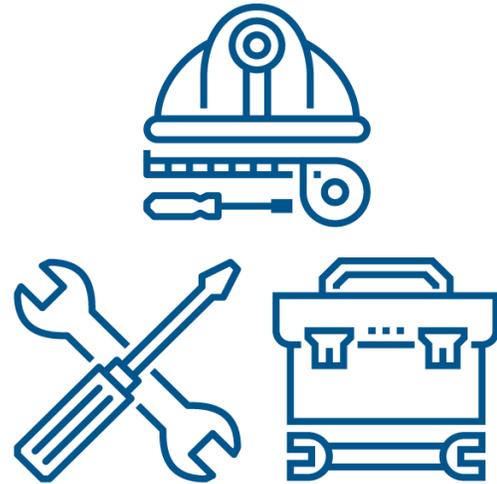
PeopleSoft

EBS

SAP

Customization

Oracle SaaS

Conversion Planning

Scope
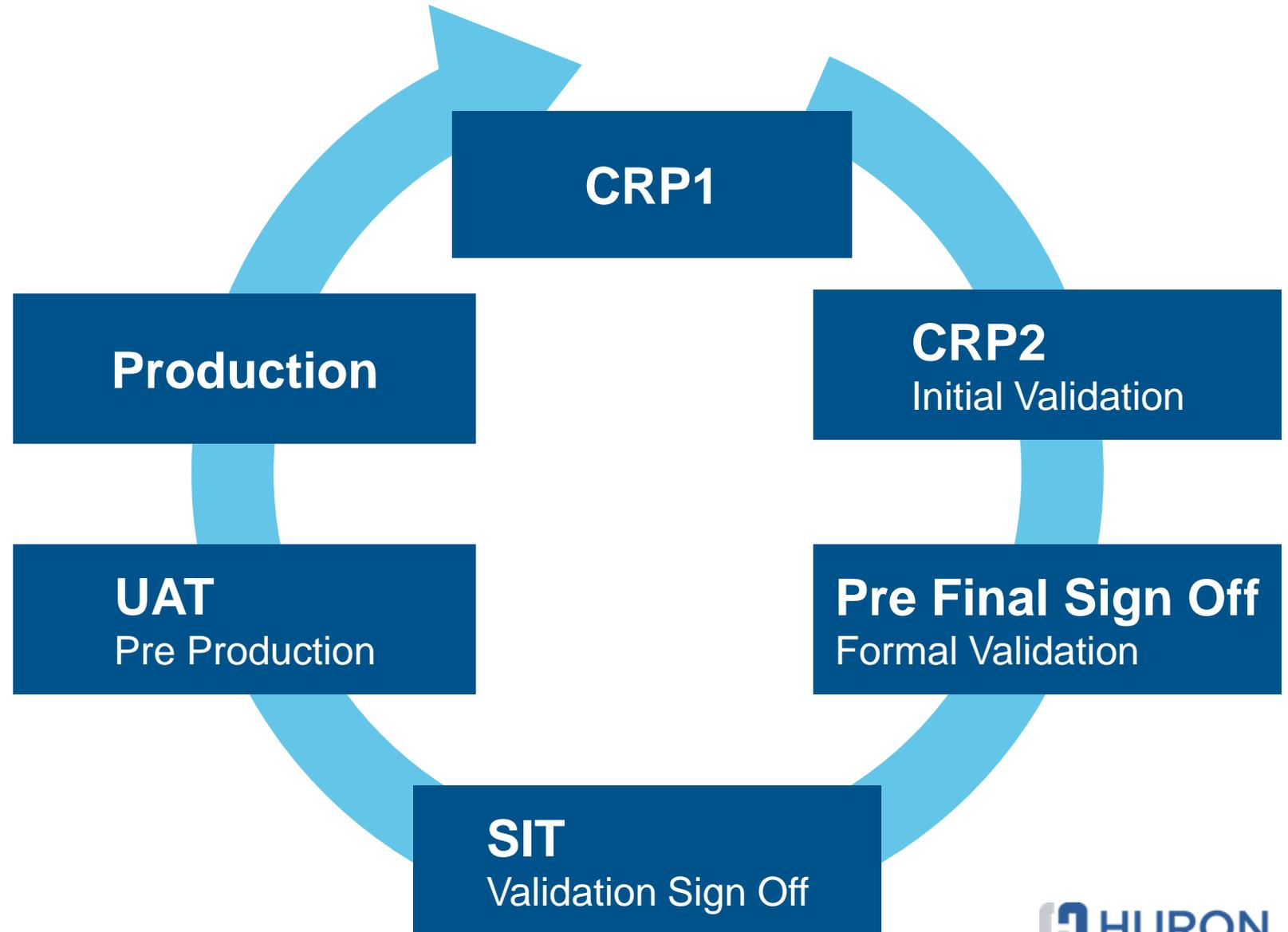- What
- Methods
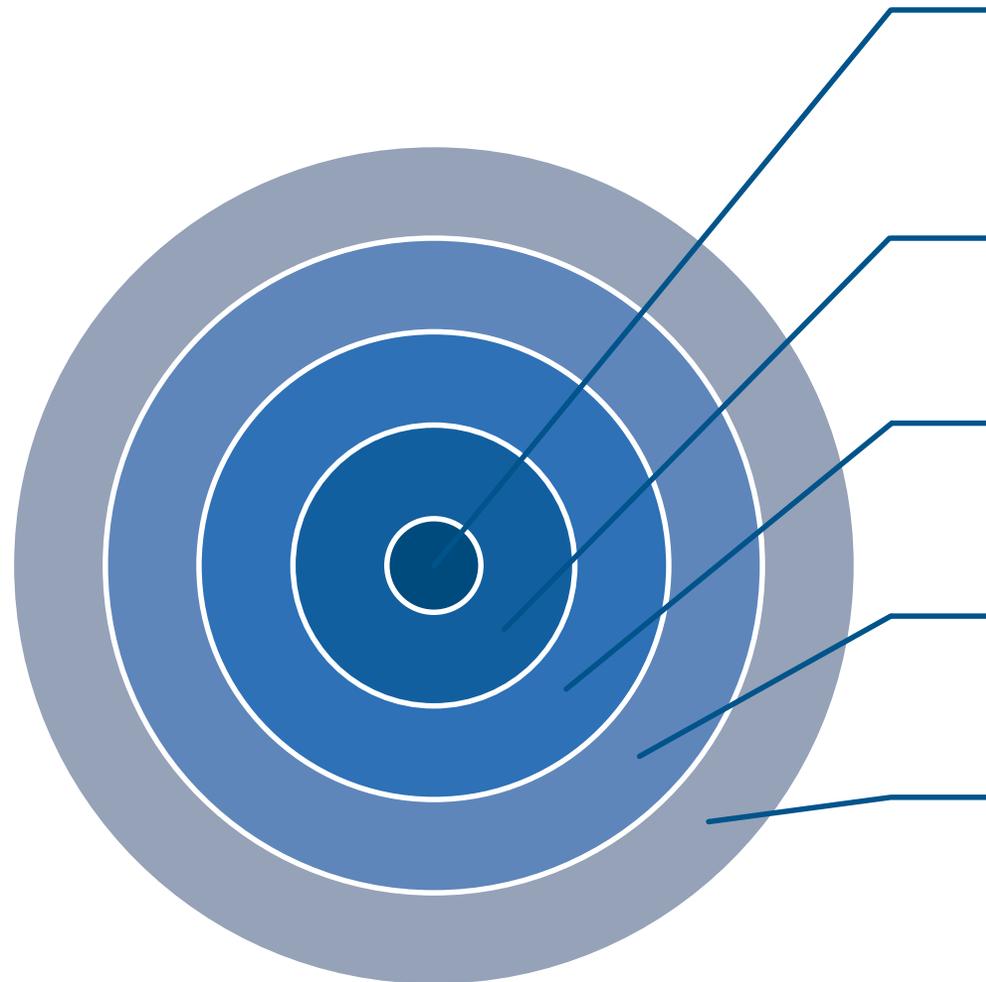- Resources

Iterations
- Min 4
- Align With Testing

Validation
- Methods
- Sign off

Conversion Validation

CRP1

CRP2
Initial Validation

Pre Final Sign Off
Formal Validation

SIT
Validation Sign Off

UAT
Pre Production

Production

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Conversion Validation Methods

Test scenarios during testing cycles will include converted data to ensure transactions can be executed against converted data

Financial Statement Validation – Comparing financial statements such as balance-sheets, income statements from legacy vs. ERP Cloud

Data Comparison – Using Database to review large volume of data and highlight issue areas
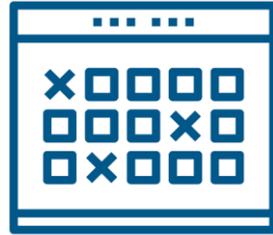
Aggregate Data Validation – Conversion counts and error reports from the import programs will ensure the proper volume (or # rows) of data is converted

Source-to-Target Data Validation – Review the data online side-by-side in source and target systems
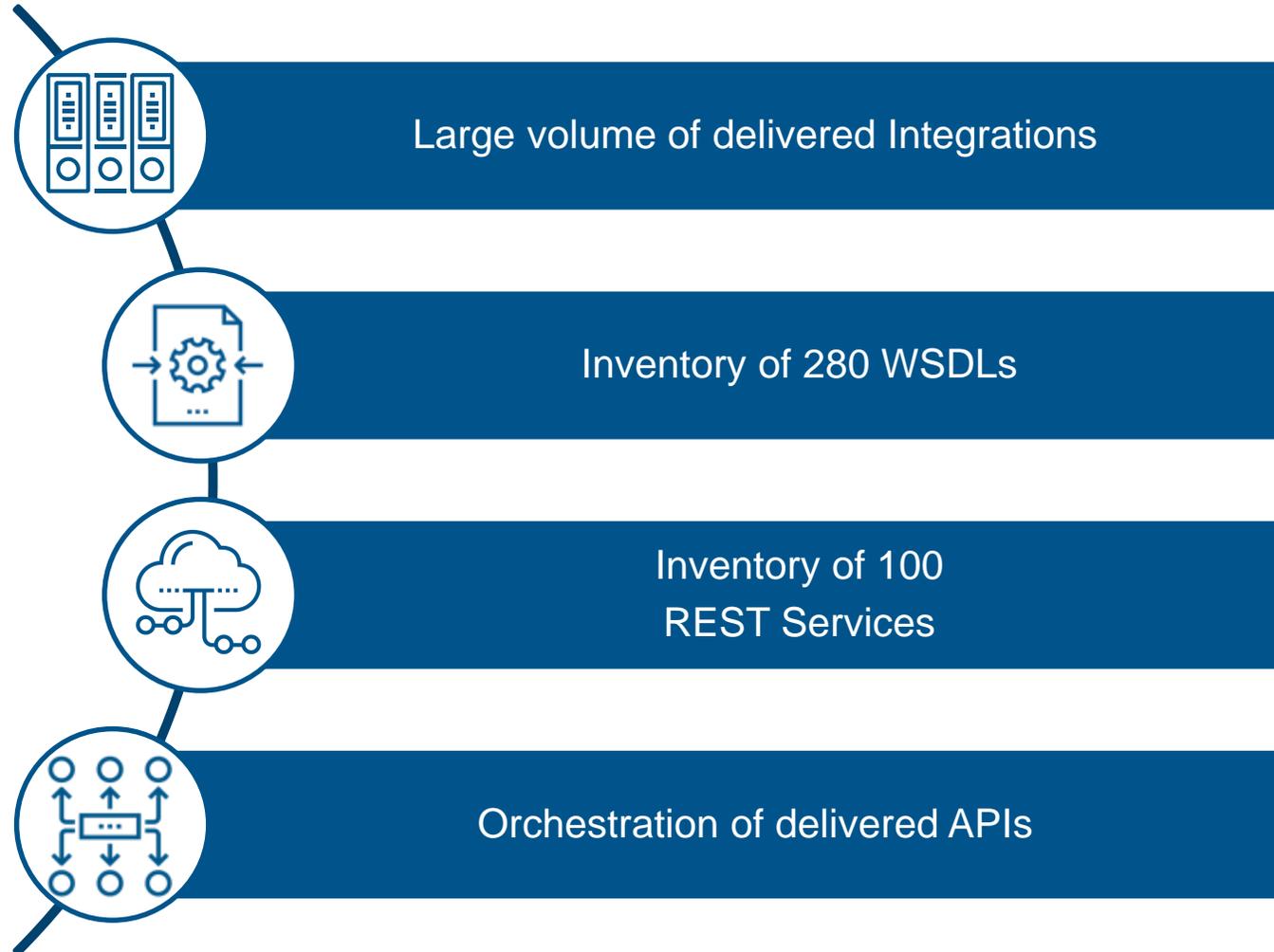
Conversion Standardization
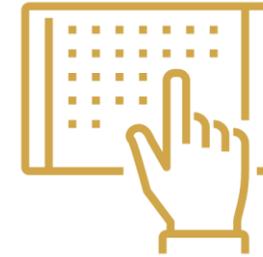
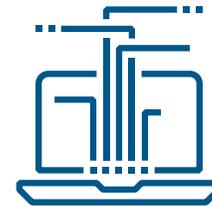| Start Early	Communicate	Plan	Build Workgroup

Conversion Standardization

Common Source of Truth

Single Point of Access

Inventory Reduction by 50%

Lessons Learned

- Determine Scope early
- Define Cycles
- Standardize Framework
- Leverage all available Tools
- Constant Communication with Functional Team

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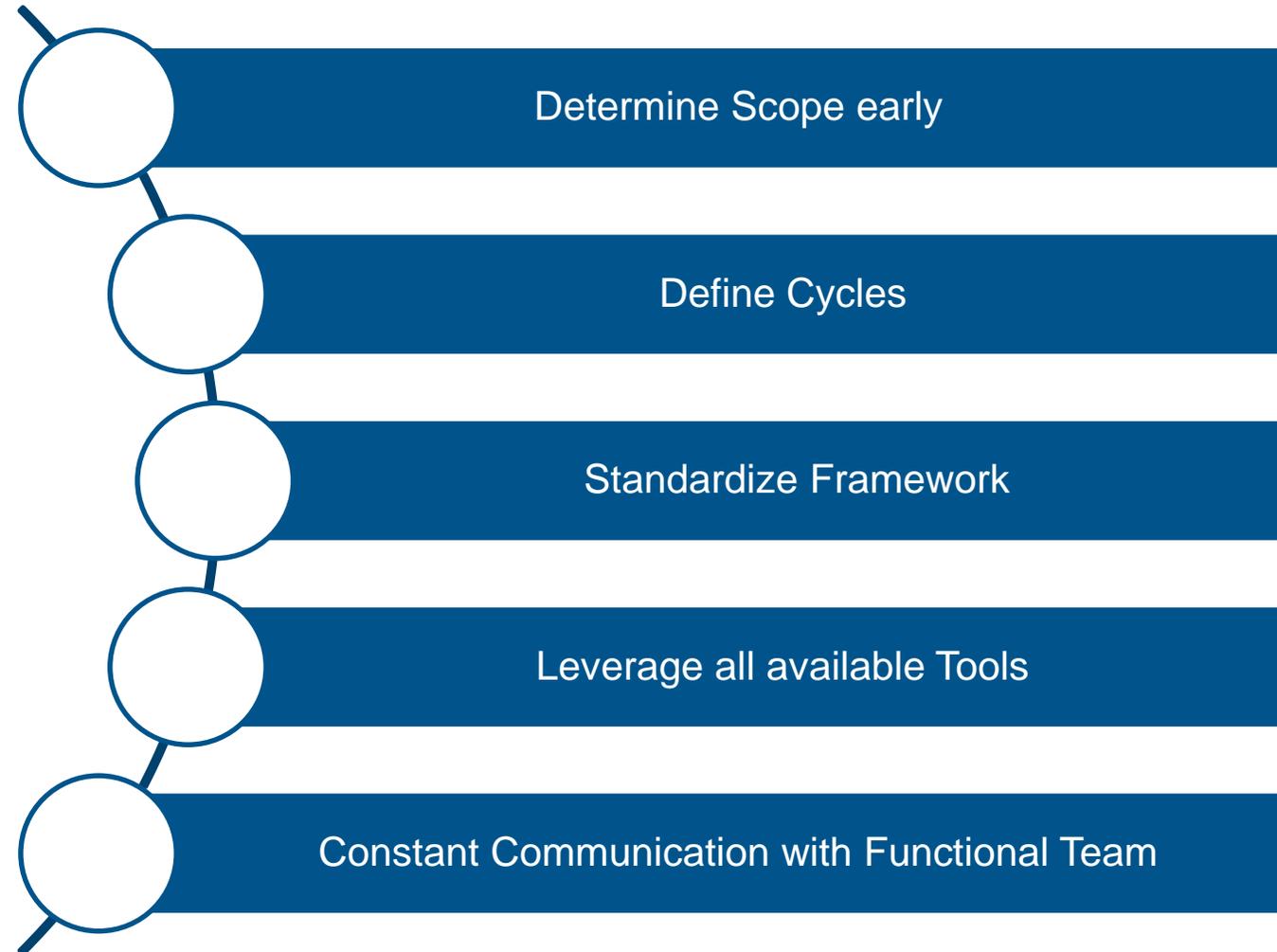
Technology Planning Determines Success

Technology Management

Project Management
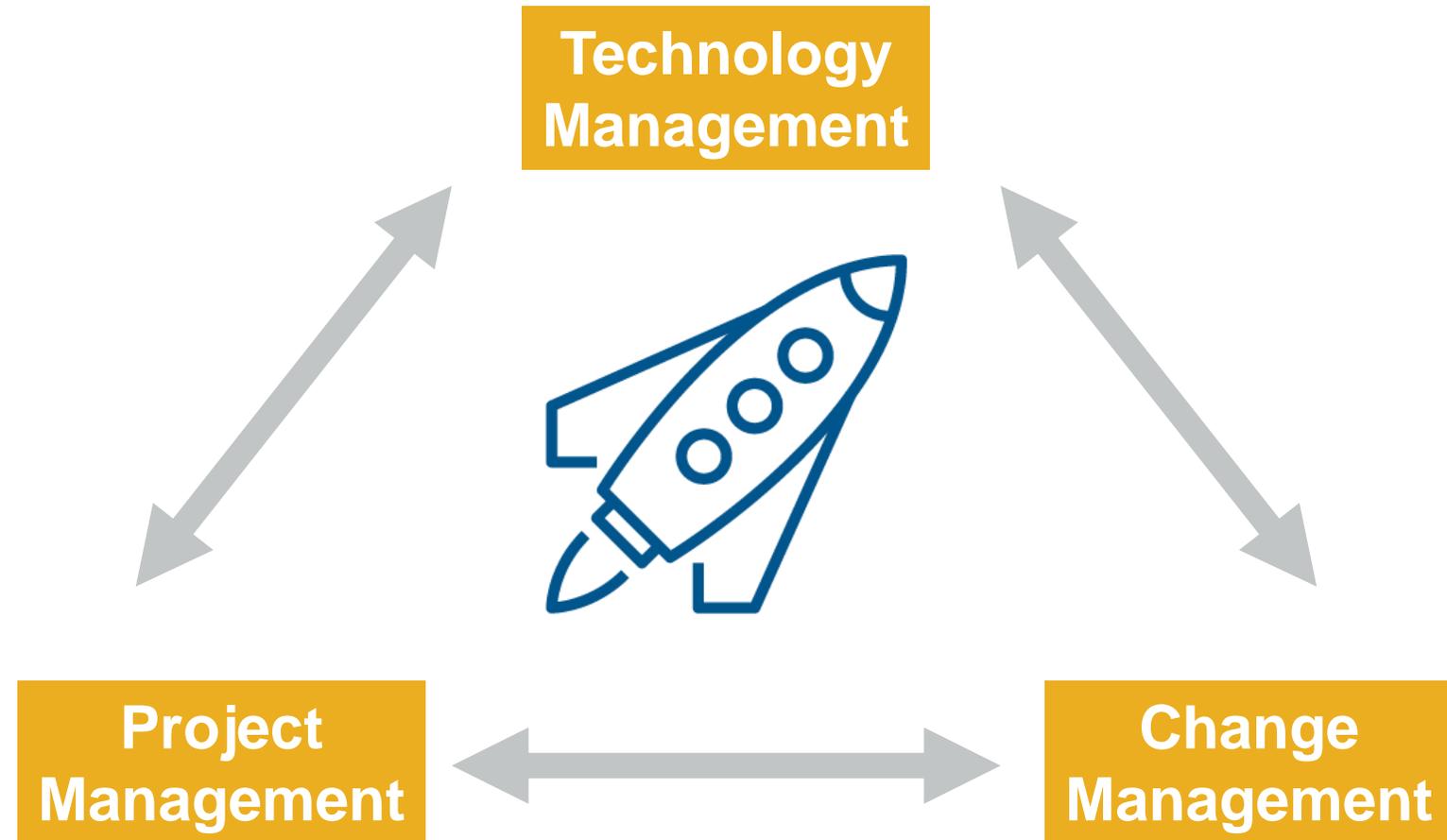
Change Management

INTERESTED IN LEARNING ABOUT HOW TO GET YOUR KEY STAKEHOLDERS TO EMBRACE CHANGE MANAGEMENT?

Then be sure to register for the next webinar in this series, Change Management for Key Stakeholders and Users.
It will take place on **Wednesday, June 27 at 1:00 pm CT.**

https://www.heug.org/page/education-series-schedule